Tuna Newsletter

National Marine Fisheries Service
• Southwest Region
• Southwest Fisheries Center

LIBRARY
MAR - 2 1990
National Marine Fisheries Service
2570 Dole Street
Honolulu, Hawaii

IN THIS ISSUE

Issue 96 February 1990

- Third-quarter U.S. purse seine effort down, receipts at U.S. canneries down, compared to same period in 1988.....1
- Atlantic Swordfish Management Update: South Atlantic Council prepares amendment to Fishery Management Plan.....3
- Recent developments in tuna fisheries: News from Canada, Europe and Latin America.....6

U.S. TUNA STATISTICS

Editor's note: The following articles were prepared by NMFS personnel from data and information gathered from sources in the U.S. tuna industry. (G. Sakagawa)

THE U.S. TUNA INDUSTRY IN THIRD QUARTER, JULY-SEPT., 1989

Pat Donley, SWR, 300 S. Ferry St., Terminal Island, CA 90731, U.S.A.

Sixty-three vessels of the U.S. tropical tuna purse seine fleet were at sea at least one day during the third quarter of 1989, down five vessels from the number active in the third quarter of 1988 (Table 1). Total capacity at sea was down 8%.

Table 1. Number of active U.S. tropical tuna purse seine vessels and fish-holding capacity (st) in the third quarter of 1989 and 1988 by fishing area.

AREA	1988	1989
	No. of vessels	
E. PACIFIC	38	29
W. PACIFIC	30	34
TOTAL	68	63
	Fleet capacity	
E. PACIFIC	36,885	26,362
W. PACIFIC	38,275	42,775
TOTAL	75,130	69,137

Receipts of all tuna species totaled 128,163 short tons (st) at U.S. canneries during the third quarter of 1989, down 5% from third-quarter 1988 and down 8% from the recent long-term (1984-1988) average (Table 2). Third-quarter deliveries from domestic sources were 62,651 st, up 4% from 1988; imports were 65,512 st, down 13%.

Yellowfin tuna was the largest component of third-quarter, raw tuna deliveries, comprising 45% of the total.

The western Pacific Ocean was the principal fishing area for tuna delivered to U.S. canneries in the third quarter of 1989, contributing 39% of total receipts (Fig. 1a). The

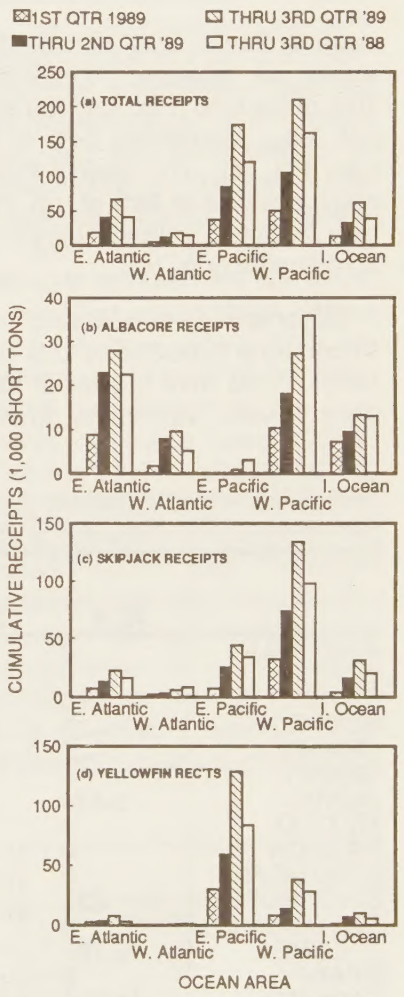

Fig. 1. Cumulative cannery receipts of raw tuna by quarter and area of capture for 1988 and 1989. Receipts of yellowfin(d) includes small amounts of bigeye, blackfin and bluefin.

Table 2. U.S. cannery receipts (st) of domestic and imported raw tuna by species in the third quarter. Cumulative receipts through the third quarter are in parentheses.

YEAR	SPECIES ALBACORE		SKIPJACK		YELLOWFIN[1]		TOTAL
1988							
DOMESTIC	3,079	(6,487)	32,031	(89,129)	25,161	(82,185)	60,271
IMPORTED	27,721	(73,378)	37,201	(88,075)	10,280	(39,973)	75,202
TOTAL	30,800	(79,865)	69,232	(177,204)	35,441	(122,158)	135,473
1989							
DOMESTIC	871	(4,003)	26,005	(86,192)	35,775	(82,304)	62,651
IMPORTED	19,540	(75,268)	24,332	(98,561)	21,640	(60,674)	65,512
TOTAL	20,411	(79,271)	50,337	(184,753)	57,415	(142,978)	128,163
AVG. 84-88							
DOMESTIC	4,201	(5,089)	23,956	(80,690)	32,683	(95,631)	60,841
IMPORTED	29,515	(75,678)	31,433	(79,278)	17,244	(48,760)	78,192
TOTAL	33,716	(80,767)	55,389	(159,968)	49,927	(144,392)	139,033

[1]Includes a small amount of bigeye, blackfin and bluefin tuna.

western Pacific was the principal source of albacore, contributing 45% of the total (Fig. 1b), and skipjack tuna, contributing 54% of the total (Fig. 1c). The eastern Pacific was the source of 68% of U.S. cannery receipts of yellowfin tuna in the third-quarter (Fig. 1d).

Major foreign suppliers of raw, frozen tuna imported by U.S. canneries in the third quarter of 1989 were Taiwan, Venezuela, France, South Korea, Vanuatu and Spain, in that order (Table 3). Taiwan was the principal supplier of albacore, France for skipjack and Venezuela for yellowfin tuna.

Contract prices for tuna caught by U.S. vessels and delivered to U.S. canneries in American Samoa and Puerto Rico were generally lower in the third-quarter of 1989 as compared to the same period in 1988 (Table 4). Top contract price in American Samoa and Puerto Rico were the same--$1090/st for yellowfin and $875/st for skipjack. Note that actual prices paid to contract U.S. vessels differ from contract prices and are determined at time of unloading, subject to condition of the load such as temperature, salt content and physical condition of the fish. Prices paid to non-contract U.S. and foreign vessels varied according to market conditions and quality of fish at the time of unloading.

Table 3. U.S. cannery imports (st) of raw tuna by species[1] and flag of catcher vessel in the third quarter of 1989. Total for third quarter 1988 is given for comparison.

	1989				1988
	ALB	SKJ	YFT[2]	TOTAL	TOTAL
AUSTRALIA	0	172	106	278	0
BRAZIL	0	0	0	0	1,771
CAYMAN IS.	0	0	0	0	443
ECUADOR	0	1,465	1,548	3,013	1,329
FRANCE	0	6,777	1,137	7,914	3,511
GHANA	0	0	0	0	6,990
JAPAN	3,434	0	0	3,434	13,928
MEXICO	0	550	3,298	3,848	4,622
PANAMA	0	0	0	0	1,213
PORTUGAL	0	0	0	0	113
SINGAPORE	239	0	0	239	0
SOLOMON IS.	0	1,738	135	1,873	0
S. KOREA	3,788	2,052	1,605	7,445	14,116
SPAIN	0	4,686	854	5,540	2,857
TAIWAN	11,968	1,041	1,074	14,083	20,923
TONGA	100	0	22	122	103
VANUATU	0	3,039	2,923	5,962	2,579
VENEZUELA	11	2,812	8,922	11,745	702
UNKNOWN	0	0	15	15	0
TOTAL	19,540	24,332	21,639	65,511	75,200

[1]ALB=albacore; SKJ=skipjack; YFT=yellowfin.
[2]Includes a small amount of bigeye, blackfin and bluefin tuna.

Imports of canned tuna not in oil to the U.S. in the third-quarter of 1989 exceeded both 1988 and recent (1984-1988) average imports for the same period (Fig. 2). Imports to date of canned tuna not in oil, 253 million pounds, exceeded 1988 imports for the same period by

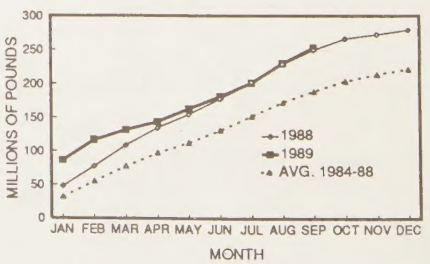

Fig. 2. Cumulative monthly imports (million of lbs.) of canned tuna not in oil to the U.S. for 1989, 1988 and average 1984-1988.

2% and the recent average by 34%. The 1989 quota of 76.7 million pounds, that triggers increased duty on canned imports, was reached on January 25, 1989, the earliest date on record. At the end of the third quarter, imports exceeded the quota by 230%.

The wholesale prices of canned tuna were relatively stable in third-quarter 1989 as compared to a year ago. There was, however, a significant price decline in private label, light meat chunk in the third quarter as compared to a year ago (Table 5). Note that actual wholesale prices paid for transactions vary according to market conditions and are not reflected in these statistics.

Doug Prescott, SWFC, and Mike Thabault, SWR, contributed to this article.

REPORTS

Editor's note: Original reports are published as a service to subscribers and may not represent the views of the SWR or SWFC. Readers should contact the authors of reports for details, if needed. (D. Au)

ATLANTIC SWORDFISH MANAGEMENT UPDATE

Steven A. Berkeley, South Atlantic Fishery Management Council, Southpark Building, Suite 306, 1 Southpark Circle, Charleston, SC 29407-4699, U.S.A.

The South Atlantic Council, in consultation with the New England, Mid-Atlantic, Gulf of Mexico, and Caribbean Councils, has prepared an Amendment to the U.S. Fishery Management Plan for Atlantic Swordfish, which, if approved, would reduce U.S. Atlantic landings by approximately 80%. The Councils and their scientific advisors believe that such severe restrictions are necessary to allow the spawning stock biomass to rebuild and to prevent a resource collapse.

Fishery Status

Results of recent stock assessments indicate that swordfish in the north Atlantic are severely overfished. A stock assessment conducted by the National Marine Fisheries Service in March, 1989, and subsequently reviewed by a Council-appointed panel of scientists, concluded that fishing mortality reached a level of F=0.79 in 1987, almost four times higher than the level recommended by the review panel, and has continued to increase (Figure 1). This rate of fishing mortality will reduce the spawning stock biomass per recruit (SSB/R) to between 4% and 9% of the level that would result without fishing. A more recent stock assessment, conducted by the International Commission for the Conservation of Atlantic Tunas (ICCAT) in October 1989, confirmed that the fishing mortality in the western north Atlantic continued to increase, and reached F=0.99 in 1988. The NMFS assessment indicates that spawning stock biomass has declined continuously since 1979, and in 1987 was only 40% of the 1978 level (Figure 2). Further, it was concluded that despite recent apparently good

Table 4. Cannery contract prices (U.S. dollars per st) for skipjack and yellowfin tuna caught by U.S. vessels that departed on trips in third quarter of 1988 and 1989.

	SKIPJACK		YELLOWFIN	
SIZE CLASS (lbs)	**1988**	**1989**	**1988**	**1989**
American Samoa				
20 +	-	-	1150-1065	975-1090
7.5 to 20	-	-	1010-920	775-900
7.5+	985-875	750-875	-	-
4 to 7.5	935-815	670-790	935-815	670-790
3 to 4	735-615	460-585	735-615	460-585
3 -	460-340	250-365	460-340	250-365
Puerto Rico				
20 +	-	-	1150-1065	975-1090
7.5 to 20	-	-	1025-935	785-900
7.5+	1010-900	760-875	-	-
4 to 7.5	945-825	675-790	945-825	675-790
3 to 4	735-615	470-585	735-615	470-585
3 -	460-340	250-365	460-340	250-365

Table 5. Wholesale list price (U.S. dollars per case) for tuna canned in water for white-meat and light-meat packs in the third quarter of 1988 and 1989.

PACK	YEAR	ADVERTISED LABEL	PRIVATE LABEL
White meat[1]	1988	64.50-67.15	51.00-51.50
	1989	64.50-65.00	50.00-52.00
Light meat[2]	1988	42.45-45.00	29.00-31.50
	1989	42.45-45.00	25.00-27.00

[1]White Meat: solid, 12.5 oz can (24 per case)
[2]Light Meat: chunk, 6.5 oz can (48 per case)

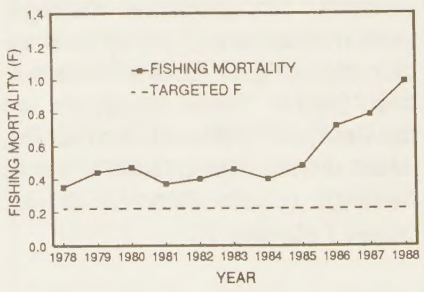

Fig. 1. Trend in fishing mortality rate (F) and recommended F.

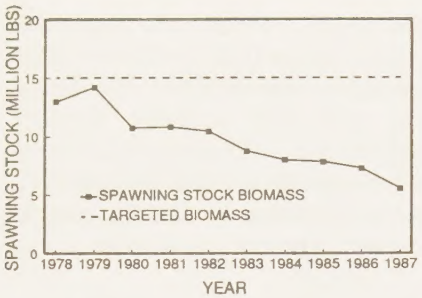

Fig. 2. Trend in spawning stock biomass and targeted biomass.

recruitment, the current rate of fishing mortality would cause a continued decline in the spawning stock, placing the stock in increased jeopardy of recruitment failure. The review panel also noted that, regardless of which stock structure hypothesis was assumed (separate northwest and northeast Atlantic stocks or a single north Atlantic stock), the same general conclusions would apply.

Based on these results, the scientists recommended that management action be taken to allow the spawning stock to rebuild within five years to the level associated with a fishing mortality rate producing SSB/R equivalent to 30% of SSB/R without fishing. The South Atlantic Council, responsible for the management of Atlantic swordfish, accepted this advice and developed a management regime designed to accomplish this objective.

The Councils determined that the principal management measure would be an overall quota to be determined by an allowable biological catch based on spawning stock biomass. The proposed management measures and a very brief explanation of their rationale are outlined below. These measures are the Councils' preferred alternatives, which are now being taken to public hearings (public comment period closes February 9).

Proposed Management Measures

1. Acceptable biological catch *(ABC) in the initial year (1991) will be 3.83 million pounds dressed weight stock-wide.*

   This is the ABC associated with a fishing mortality rate that should allow the spawning stock biomass to recover to the target level within five years.

2. *Total allowable catch (TAC) for the U.S. fishery is 1.85 million pounds dressed weight for the initial year (1991).*

   This is the proportion of ABC that the U.S. catch represents of the total catch from the stock, defined by the Atlantic area north of 50°N latitude and west of 30°W longitude.

3. *The entire TAC in the initial year is allocated to the tuna longline fishery. Directed fishing for swordfish is prohibited until TAC for the upcoming year exceeds the projected potential bycatch of swordfish from the U.S. tuna fishery by at least 10%.*

   The Councils estimate that a directed fishery could take the entire quota in as little as a few days. Once the quota was taken, the tuna longline fishery would continue to take swordfish as a bycatch, most of which would be dead. Therefore, the Councils felt that it would be impossible to prevent TAC from being exceeded unless the directed fishery was prohibited. However, as the stock recovers and TAC increases to the point that the tuna fishery's bycatch will not exceed TAC, the directed fishery will be reopened.

4. *The use of artificial lights and/or lightsticks on longlines is prohibited until the directed fishery is reopened.*

   Artificial lights and lightsticks are used to catch swordfish. Logbook data indicate that lightsticks do not increase the tuna catch. Since directed swordfishing is prohibited, the use of lights or lightsticks is not necessary and would only provide a way of circumventing the intent of this management measure.

5. *TAC will be allocated entirely to the bycatch fishery in the initial year, using a two-tiered bycatch allocation system. The initial bycatch will be 6 swordfish per trip. If the vessel carries and pays for an observer, all dead swordfish may be retained if the observer certifies that they were a legitimate bycatch of directed tuna fishing.*

   All vessels would be allowed a bycatch allocation of six fish per trip, which is the estimated average swordfish bycatch from directed tuna trips. However, the Councils recognize that there will be times and areas in which the annual bycatch is greater than average. The two-tiered system would allow swordfish in excess of the standard allocation to be retained (subject to the stated conditions). This system will reduce waste and increase economic returns to the industry with no additional impact on the resource, and allow increased observer coverage and scientific sampling opportunities at little or no cost to the government.

6. *Nighttime longlining is prohibited after the quota (TAC) is reached. This regulation is to apply to both foreign and domestic longline fisheries inside the EEZ.*

   Despite prohibiting directed swordfish fishing, it is anticipated that the tuna fishery will exceed the quota in the initial year. Since most swordfish are dead when caught on longlines, continued tuna longlining will result in ex-

cess mortality. Since virtually all swordfish are caught at night, prohibiting nighttime longlining after the quota is taken will prevent TAC from being exceeded.

7. *Imports of swordfish from the same stock will be prohibited after the quota is taken and the U.S. fishery is closed.*

The purpose of imposing import restrictions is to prevent an increase in foreign catch from the same stock to fill the void created by the sharp reduction in domestic landings.

8. *There will be a recreational fishing allocation of 110 fish subject to the following restrictions:* ***A.*** *Sale is prohibited.* ***B.*** *Minimum size of 150 pounds whole weight (no minimum size and 75 pounds minimum size are options also being considered).* ***C.*** *Rod and reel only.* ***D.*** *A permit or stamp may be issued to track the quota.*

The recreational fishery is very small. However, since the recreational fishery was in no way responsible for the decline of the resource, it was felt that they should not be further penalized by closing the fishery when the commercial fishery had taken the quota.

9. *A control date of August 16, 1989, is established as a benchmark for possible limited entry.*

The Councils believe that effective management of the swordfish fishery will ultimately require some form of limited entry. A control date establishes a cut-off date for eligibility in a limited entry system should one be developed.

10. *Drift entanglement gill net fishing is prohibited in the swordfish fishery.*

Currently, there are 15 boats engaged in this fishery, all in the New England area. The Councils' feeling that new, non-traditional gear should not be allowed in such a severely overfished fishery, combined with the gear's documented bycatch of marine mammals, convinced them to prohibit the use of this gear.

11. *The Councils recognize that effective management of the swordfish resource will require international cooperation. Therefore, the Councils strongly recommend that the U.S. negotiate an international swordfish management program through ICCAT.*

The stock is not fully contained in the U.S. EEZ. Significant foreign harvest of swordfish from the same stock outside of the U.S. EEZ necessitates international management to adequately conserve the resource.

Submission Schedule

The public comment period on the amendment will close on February 9, 1990. All comments will be reviewed by the South Atlantic Council at its meeting in Savannah, Georgia, February 27 and 28. Following this meeting, the amendment will be modified as appropriate, redrafted, and submitted to the Secretary of Commerce for formal review in mid-March. If approved, the amendment could be implemented as early as mid-June 1990.

Secretarial Emergency Action

In a separate action, the Secretary of Commerce is considering implementing a Secretarial Emergency Action to immediately begin controlling the U.S. harvest of Atlantic swordfish. Management measures that would be imposed by this action are uncertain at this time, but are likely to include time/area closures, a prohibition on directed swordfish fishing inside the EEZ, and a minimum size for swordfish regardless of where caught. A

1990 TUNA MEETINGS

(Organizer; meeting type: sci=science, adm=administration)

- FEB 13-14. FY89 Tuna Research Conference. Shimizu, Japan. (Fisheries Agency of Japan; sci and adm)
- FEB 22-24. Annual consultation for South Pacific Tuna Treaty fisheries between U.S. and Pacific Island nations. Port Moresby, Papua New Guinea. (Forum Fisheries Agency; adm)
- MAR 2-7. Second consultation on arrangements for South Pacific Albacore Fisheries Management. Honiara, Solomon Islands. (Forum Fisheries Agency; adm)
- MAY 21-24. 41st Tuna Conference. Lake Arrowhead, CA, U.S.A. (Southwest Fisheries Center; sci)
- MAY 25-31. World Meeting on Bluefin Tunas. La Jolla, CA, U.S.A. (Inter-American Tropical Tuna Commission; sci)
- JUN 24-28. Expert Consultation on Stock Assessment of Tunas in the Indian Ocean. Maldives. (Indo-Pacific Tuna Program; sci)
- JUN 26-28. 47th IATTC commission meeting. Washington, DC, U.S.A. (Inter-American Tropical Tuna Commission; adm)
- OCT 29 - NOV 2. ICCAT, species group meetings. Madrid, Spain. (International Commission for the Conservation of Atlantic Tunas (ICCAT); sci)
- NOV 5-9. ICCAT, Standing Committee on Research and Statistics meeting. Madrid, Spain. (ICCAT; sci)
- NOV 12-15. ICCAT, Commission meeting. Madrid, Spain. (ICCAT; adm)

Secretarial Emergency Action can be imposed for a maximum of 180 days, and requires neither public comment period nor Council approval. A decision on this action is expected by February.

RECENT DEVELOPMENTS IN TUNA FISHERIES

Editor's note: The following news articles were compiled from reports of the NMFS Branch of Foreign Fisheries Analysis, Office of International Fisheries, Washington, D.C. Dennis Weidner, Don Jacobson, P. Niemeier and Francisco Quintanilla contributed to these reports with the assistance of other NMFS officials and U.S. Foreign Service officers. (P. Kleiber)

CANADA

Canadian tuna cannery studies Caribbean -- B.C. Packers (Vancouver) has reportedly been scouting several Central American and Caribbean countries for a possible expansion of their overseas operations. Until now, the company's operations have centered on its Mar Fish operation in Zamboanga (the Philippines). B.C. Packer's is reportedly interested primarily in the European market. The European Community has high canned tuna tariffs (18-24 percent), but a B.C. Packers operation in one of the Caribbean Community (CARICOM) countries could be eligible for lower rates under the European Community Lome Convention.

EUROPE

Italy imports tuna -- Italian frozen tuna imports have increased sharply in recent years to supply that country's growing domestic market for canned tuna. Imports totaled 120,000 metric tons (mt) in 1987, more than 50 percent above the 77,000 mt imported in 1982. Imports dipped slightly in 1988 and totaled less than 114,000 mt. The principal supplier has been Spain, but in 1988, shipments from the Seychelles were more than twice as large as shipments from Spain. (Some of the Seychelles tuna, however, are caught by Spanish vessels.) Two Latin American countries (Mexico and Venezuela) have become major suppliers, although precise data cannot be determined because of transshipments through Panama. Shipments from these two countries account for about 25 percent of Italian imports, totaling 32,800 mt in 1988, a 30 percent decline from the 47,100 mt imported in 1988. Mexican and Venezuelan shipments, like Spanish shipments, were adversely affected by the large 1988 Seychelles shipments (35,700 mt).

MEXICO

Exemption from price controls on some products sought by Mexican tuna canners -- Mexican tuna canners face price controls on their product which the Commerce Secretariat (SCID) defines as a "basic staple." The price controls limit the prices canners can offer fishermen who, as a result, are forced to export most of their catch frozen instead of selling it to the canners. The canners would like the SCID to separate the current category of "canned tuna" into chunk, flake, in oil, in water, etc., so that some types would be exempted from the price controls. Canners believe that if they could earn higher prices domestically, they would be able to modernize their operations and eventually compete in the export market. This would mean more jobs and increased profits through the value added. Currently, the bulk of Mexico's tuna catch is exported frozen with little or no processing.

Record year for Mexican tuna -- The Secretaria de Pesca (SEPESCA) projects 1989 as another record year for the Mexican tuna fishery. Fishermen caught 98,000 mt during the first eight months of 1989, nearly 20 percent more than in the same period in 1988. SEPESCA reports that July and August catches were exceptionally good. Yellowfin continues to be the principal species taken, although in somewhat smaller proportions than in the past few years. SEPESCA also reported that tuna exports are setting a new record. The Regional Fisheries Attach) at the U.S. Embassy in Mexico City reports that export shipments totaled 35,000 mt for the first six months of 1989.

SOUTH AMERICA

New Peruvian tuna fleet -- Peru has launched the country's first privately operated tuna company, Atunera Bolivariana (AB). A previous state-owned tuna company (PEPESCA) was a costly failure. AB has purchased the rights to four PEPESCA vessels, but it is not clear whether they are serviceable. Two were scuttled in the Bay of Paita and the other two have laid unassembled at the SIMA shipyard for more than 10 years. (The vessels were purchased in "kit" form from two United Kingdom shipyards.) AB is owned and operated by Lucas de Tramontana who has managed anchovy vessels in Peru and tuna vessels in Ecuador. He hopes to process the catch in Peruvian canneries.

Decreasing catch in Uruguayan longline fishery -- The longline fishery for tuna and swordfish out of Montevideo has declined significantly in recent years. Fishermen caught only 1,200 mt of swordfish, albacore and other species in 1988, a decline of nearly 80 percent from the 5,600 mt reported in 1984. The record catch for swordfish (2,500 mt) was reported in 1984 and for albacore (1,500 mt) in 1985. Catches during early 1989 were reportedly below

1988 levels. The decline is primarily due to reduced activity by foreign vessels. Currently there are only three fishing companies operating with more than five vessels. All three are believed to be Uruguayan-Japanese joint ventures. Almost all of the catch is exported: albacore (Puerto Rico for canning); bigeye/-yellowfin (Japan for sashimi); sharks (Germany-FRG and the Netherlands); and swordfish (United States as fillets.)

PUBLICATION STAFF

Diane Pickelsimer, Production
David Au, Reports
Pat Donley, Statistics
Pierre Kleiber, Fisheries Developments
Al Jackson, Copy Editor
Ken Raymond, Art Director

ORGANIZATION

Southwest Regional Office

E. Charles Fullerton, Director

Southwest Fisheries Center

Izadore Barrett, Science and Research Director, Southwest Region
Gary Sakagawa, Tuna Program Coordinator

AIR MAIL

U.S. DEPARTMENT OF COMMERCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION
NATIONAL MARINE FISHERIES SERVICE
SOUTHWEST FISHERIES CENTER
8604 LA JOLLA SHORES DR. -P.O. BOX 271
LA JOLLA, CALIFORNIA 92038

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, $300

AIR MAIL

U.S.MAIL

POSTAGE AND FEES PAID
U. S. DEPARTMENT OF COMMERCE
COM-210

LIBRARY, HONOLULU LABORATORY
NMFS/NOAA (F/SWC2)
2570 DOLE STREET
HONOLULU, HI 96822-2396